

COVER PAGE

A Public Document

Please type or print in ink.

| | | | |
|---|---------|----------|---|
| NAME (LAST) | (FIRST) | (MIDDLE) | DAYTIME TELEPHONE NUMBER |
| Takai | Teresa | | (916) 319-9223 |
| MAILING ADDRESS (May use business address) | STREET | CITY | STATE ZIP CODE OPTIONAL: FAX / E-MAIL ADDRESS |
| [REDACTED] | | | |

1. Office, Agency, or Court

Name of Office, Agency, or Court:

Office of the State Chief Information Officer

Division, Board, District, if applicable:

Your Position:

State Chief Information Officer

► If filing for multiple positions, list additional agency(ies)/ position(s): (Attach a separate sheet if necessary.)

Agency: _____

Position: _____

2. Jurisdiction of Office (Check at least one box)

☒ State

☐ County of _____

☐ City of _____

☐ Multi-County _____

☐ Other _____

3. Type of Statement (Check at least one box)

☐ Assuming Office/Initial

Date: ____/____/____

☒ Annual: The period covered is January 1, 2008, through December 31, 2008.

-or-

☐ The period covered is ____/____/____, through December 31, 2008.

☐ Leaving Office (Check one)

Date Left: ____/____/____

☐ The period covered is January 1, 2008, through the date of leaving office.

-or-

☐ The period covered is ____/____/____, through the date of leaving office.

☐ Candidate

Election Year: _____

4. Schedule Summary

► Total number of pages including this cover page: 12

► Check applicable schedules or "No reportable interests."

I have disclosed interests on one or more of the attached schedules:

Schedule A-1 ☒ Yes - schedule attached
Investments (Less than 10% Ownership)

Schedule A-2 ☐ Yes - schedule attached
Investments (10% or greater Ownership)

Schedule B ☐ Yes - schedule attached
Real Property

Schedule C ☐ Yes - schedule attached
Income, Loans, & Business Positions (Income Other than Gifts and Travel Payments)

Schedule D ☒ Yes - schedule attached
Income - Gifts

Schedule E ☒ Yes - schedule attached
Income - Gifts - Travel Payments

-or-

☐ No reportable interests on any schedule

5. Verification

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed April 1, 2009
(month, day, year)

Signature _____

(File the originally signed statement with your filing official.)

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name

Teresa Takai

▶ NAME OF BUSINESS ENTITY
BHP Billiton LTD

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
various commodities

FAIR MARKET VALUE
☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
SAP AG-SPON ADR

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Software

FAIR MARKET VALUE
☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
Ford Motor Company

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Automobile Manufacturer

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
HSBC Holdings PLC

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Banking

FAIR MARKET VALUE
☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
Banco Bilbao Vizcaya Argentiniara S A ADR

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Banking

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
Chicago Bridge & Iron

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Engineering

FAIR MARKET VALUE
☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

Comments:

SCHEDULE A-1**Investments****Stocks, Bonds, and Other Interests**

(Ownership Interest is Less Than 10%)

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name

Teresa Takai

▶ NAME OF BUSINESS ENTITY

Korea Electric Power Corp

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

Utility

FAIR MARKET VALUE

- ☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock☐ Other _____
(Describe)

IF APPLICABLE, LIST DATE:

____/____/08 ____/____/08
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

Siemens

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

Electronics & Electrical Engineering

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock☐ Other _____
(Describe)

IF APPLICABLE, LIST DATE:

____/____/08 ____/____/08
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

Roche

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

Pharmaceutical

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock☐ Other _____
(Describe)

IF APPLICABLE, LIST DATE:

____/____/08 ____/____/08
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

Barclays

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

Banking

FAIR MARKET VALUE

- ☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock☐ Other _____
(Describe)

IF APPLICABLE, LIST DATE:

____/____/08 ____/____/08
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

Tata Motors

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

automobile manufacturer

FAIR MARKET VALUE

- ☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock☐ Other _____
(Describe)

IF APPLICABLE, LIST DATE:

____/____/08 ____/____/08
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

Teva

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

Pharmaceuticals

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock☐ Other _____
(Describe)

IF APPLICABLE, LIST DATE:

____/____/08 ____/____/08
ACQUIRED DISPOSED

Comments:

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name

Teresa Takai

NAME OF BUSINESS ENTITY
Novartis

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Healthcare products

FAIR MARKET VALUE
☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
____/____/08 ____/____/08
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY
Kyocera

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Communications & electronics

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
____/____/08 ____/____/08
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY
China Mobile

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
mobile services provider

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
____/____/08 ____/____/08
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY
Novo-Nordisk

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Healthcare

FAIR MARKET VALUE
☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
____/____/08 ____/____/08
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY
Ageon

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Insurance

FAIR MARKET VALUE
☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
____/____/08 ____/____/08
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY
Diageo PLC

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Beverage Holding Co.

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
____/____/08 ____/____/08
ACQUIRED DISPOSED

Comments: _____

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name

Teresa Takai

► NAME OF BUSINESS ENTITY
Huaneng Power

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Thermal power plants

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY
China Medical Tech

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
medical devices

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY
CIA Saneamento Basico DE

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Water Well Drilling

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY
Luxottica Group

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Eyeware

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY
OAO Gazprom

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Energy

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY
Sasol LTD

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Chemical production

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

Comments:

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests
(Ownership Interest is Less Than 10%)

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name

Teresa Takai

► NAME OF BUSINESS ENTITY
Honda Motors

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Automobile Manufacturing

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY
Dow

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Chemical

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY
Nucor

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
steel manufacturing

FAIR MARKET VALUE
☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY
Caterpillar

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
equipment manufacturer

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY
Emcor Group

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
mechanical and electrical construction

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY
General Electric

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
global infrastructure

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

Comments:

SCHEDULE A-1**Investments****Stocks, Bonds, and Other Interests**

(Ownership Interest is Less Than 10%)

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name

Teresa Takai

▶ NAME OF BUSINESS ENTITY

United Technologies

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

manufacturer of high-technology products

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock

☐ Other _____
(Describe)

IF APPLICABLE, LIST DATE:

____/____/08 ____/____/08
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

URS Corp

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

Engineering

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock

☐ Other _____
(Describe)

IF APPLICABLE, LIST DATE:

____/____/08 ____/____/08
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

Proctor & Gamble

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

consumer products

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock

☐ Other _____
(Describe)

IF APPLICABLE, LIST DATE:

____/____/08 ____/____/08
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

Wal-Mart

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

discount department store

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock

☐ Other _____
(Describe)

IF APPLICABLE, LIST DATE:

____/____/08 ____/____/08
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

ConocoPhillips

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

Energy

FAIR MARKET VALUE

☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock

☐ Other _____
(Describe)

IF APPLICABLE, LIST DATE:

____/____/08 ____/____/08
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

Exxon

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

Energy

FAIR MARKET VALUE

☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock

☐ Other _____
(Describe)

IF APPLICABLE, LIST DATE:

____/____/08 ____/____/08
ACQUIRED DISPOSED

Comments:

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests
(Ownership Interest is Less Than 10%)

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name

Teresa Takai

► NAME OF BUSINESS ENTITY
American Intl Group

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Insurance

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY
Bank of America

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Financial services

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY
JP Morgan Chase

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Financial Services

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY
Wells Fargo

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Financial Services

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY
Abbott Labs

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Healthcare

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY
Bristol Myers Squibb

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Healthcare

FAIR MARKET VALUE
☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT
☒ Stock
☐ Other _____ (Describe)

IF APPLICABLE, LIST DATE:
 ____/____/08 ____/____/08
 ACQUIRED DISPOSED

Comments: _____

SCHEDULE A-1**Investments****Stocks, Bonds, and Other Interests**

(Ownership Interest is Less Than 10%)

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name

Teresa Takai

▶ NAME OF BUSINESS ENTITY

Goldman Sachs

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

Financial Services

FAIR MARKET VALUE

☐ \$2,000 - \$10,000☒ \$10,001 - \$100,000☐ \$100,001 - \$1,000,000☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock☐ Other

(Describe)

IF APPLICABLE, LIST DATE:

____/____/08
ACQUIRED____/____/08
DISPOSED

▶ NAME OF BUSINESS ENTITY

MetLife Inc

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

Insurance

FAIR MARKET VALUE

☐ \$2,000 - \$10,000☒ \$10,001 - \$100,000☐ \$100,001 - \$1,000,000☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock☐ Other

(Describe)

IF APPLICABLE, LIST DATE:

____/____/08
ACQUIRED____/____/08
DISPOSED

▶ NAME OF BUSINESS ENTITY

Enterprise Products Partners

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

Energy

FAIR MARKET VALUE

☐ \$2,000 - \$10,000☒ \$10,001 - \$100,000☐ \$100,001 - \$1,000,000☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock☐ Other

(Describe)

IF APPLICABLE, LIST DATE:

____/____/08
ACQUIRED____/____/08
DISPOSED

▶ NAME OF BUSINESS ENTITY

Penn West Energy Trust

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

Energy

FAIR MARKET VALUE

☒ \$2,000 - \$10,000☐ \$10,001 - \$100,000☐ \$100,001 - \$1,000,000☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock☐ Other

(Describe)

IF APPLICABLE, LIST DATE:

____/____/08
ACQUIRED____/____/08
DISPOSED

▶ NAME OF BUSINESS ENTITY

Trilogy Energy Trust

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

Energy

FAIR MARKET VALUE

☒ \$2,000 - \$10,000☐ \$10,001 - \$100,000☐ \$100,001 - \$1,000,000☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock☐ Other

(Describe)

IF APPLICABLE, LIST DATE:

____/____/08
ACQUIRED____/____/08
DISPOSED

▶ NAME OF BUSINESS ENTITY

Toronto Dominion Bank

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

Financial Services

FAIR MARKET VALUE

☒ \$2,000 - \$10,000☐ \$10,001 - \$100,000☐ \$100,001 - \$1,000,000☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock☐ Other

(Describe)

IF APPLICABLE, LIST DATE:

____/____/08
ACQUIRED____/____/08
DISPOSED

Comments:

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name

Teresa Takai

NAME OF BUSINESS ENTITY

Transcanada Corp

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

Energy

FAIR MARKET VALUE

- ☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock

☐ Other _____
 (Describe)

IF APPLICABLE, LIST DATE:

____/____/08 ____/____/08
 ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

Shiseido LTD

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

Hair Care and Cosmetics

FAIR MARKET VALUE

- ☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock

☐ Other _____
 (Describe)

IF APPLICABLE, LIST DATE:

____/____/08 ____/____/08
 ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

Nestle

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

Nutrition company

FAIR MARKET VALUE

- ☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock

☐ Other _____
 (Describe)

IF APPLICABLE, LIST DATE:

____/____/08 ____/____/08
 ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

BASF

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

Chemical Manufacturing

FAIR MARKET VALUE

- ☒ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☒ Stock

☐ Other _____
 (Describe)

IF APPLICABLE, LIST DATE:

____/____/08 ____/____/08
 ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock

☐ Other _____
 (Describe)

IF APPLICABLE, LIST DATE:

____/____/08 ____/____/08
 ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock

☐ Other _____
 (Describe)

IF APPLICABLE, LIST DATE:

____/____/08 ____/____/08
 ACQUIRED DISPOSED

Comments:

SCHEDULE D **Income – Gifts**

► NAME OF SOURCE

Governor Arnold Schwarzenegger

ADDRESS

State Capitol, Sacramento, CA

BUSINESS ACTIVITY, IF ANY, OF SOURCE

| DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) |
|-----------------|----------|------------------------|
| 12 / 19 / 08 | \$ 68.05 | Robe |
| ___/___/___ | \$ _____ | _____ |
| ___/___/___ | \$ _____ | _____ |

► NAME OF SOURCE

ADDRESS

BUSINESS ACTIVITY, IF ANY, OF SOURCE

| DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) |
|-----------------|----------|------------------------|
| ___/___/___ | \$ _____ | _____ |
| ___/___/___ | \$ _____ | _____ |
| ___/___/___ | \$ _____ | _____ |

► NAME OF SOURCE

ADDRESS

BUSINESS ACTIVITY, IF ANY, OF SOURCE

| DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) |
|-----------------|----------|------------------------|
| ___/___/___ | \$ _____ | _____ |
| ___/___/___ | \$ _____ | _____ |
| ___/___/___ | \$ _____ | _____ |

► NAME OF SOURCE

ADDRESS

BUSINESS ACTIVITY, IF ANY, OF SOURCE

| DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) |
|-----------------|----------|------------------------|
| ___/___/___ | \$ _____ | _____ |
| ___/___/___ | \$ _____ | _____ |
| ___/___/___ | \$ _____ | _____ |

► NAME OF SOURCE

ADDRESS

BUSINESS ACTIVITY, IF ANY, OF SOURCE

| DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) |
|-----------------|----------|------------------------|
| ___/___/___ | \$ _____ | _____ |
| ___/___/___ | \$ _____ | _____ |
| ___/___/___ | \$ _____ | _____ |

► NAME OF SOURCE

ADDRESS

BUSINESS ACTIVITY, IF ANY, OF SOURCE

| DATE (mm/dd/yy) | VALUE | DESCRIPTION OF GIFT(S) |
|-----------------|----------|------------------------|
| ___/___/___ | \$ _____ | _____ |
| ___/___/___ | \$ _____ | _____ |
| ___/___/___ | \$ _____ | _____ |

Comments: _____

SCHEDULE E
Income – Gifts
Travel Payments, Advances,
and Reimbursements

| |
|--|
| CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION |
| Name <u>Teresa Takai</u> |

- Reminder – you must mark the gift or income box.
- You are not required to report "income" from government agencies.

| |
|--|
| ▶ NAME OF SOURCE <u>Kennedy School of Govt - Harvard</u> |
| ADDRESS <u>79 John F. Kennedy Street</u> |
| CITY AND STATE <u>Cambridge, MA 02138</u> |
| BUSINESS ACTIVITY, IF ANY, OF SOURCE _____ |
| DATE(S): <u>2 / 13 / 08</u> - <u>2 / 15 / 08</u> AMT: \$ <u>634.48</u> <small>(If applicable)</small> |
| TYPE OF PAYMENT: (must check one) <input checked="" type="checkbox"/> Gift <input type="checkbox"/> Income |
| DESCRIPTION: <u>Airfare for panel participation</u> |

| |
|--|
| ▶ NAME OF SOURCE <u>HIMSS</u> |
| ADDRESS <u>230 Eat Ohio Street, Suite 500</u> |
| CITY AND STATE <u>Chicago, IL 60611</u> |
| BUSINESS ACTIVITY, IF ANY, OF SOURCE <u>Health Care Information Technology</u> |
| DATE(S): <u>2 / 23 / 08</u> - <u>2 / 25 / 08</u> AMT: \$ <u>507.10</u> <small>(If applicable)</small> |
| TYPE OF PAYMENT: (must check one) <input checked="" type="checkbox"/> Gift <input type="checkbox"/> Income |
| DESCRIPTION: <u>Airfare for speaking at HIMSS Annual Conference</u> |

| |
|--|
| ▶ NAME OF SOURCE <u>Center for Digital Government</u> |
| ADDRESS <u>100 Blue Ravine Rd</u> |
| CITY AND STATE <u>Folsom, CA 95630</u> |
| BUSINESS ACTIVITY, IF ANY, OF SOURCE _____ |
| DATE(S): <u>3 / 31 / 08</u> - <u>4 / 1 / 08</u> AMT: \$ <u>823.50</u> <small>(If applicable)</small> |
| TYPE OF PAYMENT: (must check one) <input checked="" type="checkbox"/> Gift <input type="checkbox"/> Income |
| DESCRIPTION: <u>Airfare for participation in 2 panel discussions</u> |

| |
|--|
| ▶ NAME OF SOURCE <u>NASCIO</u> |
| ADDRESS <u>210 East Main Street, Suite 1405</u> |
| CITY AND STATE <u>Lexington, KY 40507</u> |
| BUSINESS ACTIVITY, IF ANY, OF SOURCE _____ |
| DATE(S): <u>3 / 14 / 08</u> - <u>3 / 15 / 08</u> AMT: \$ <u>369.00</u> <small>(If applicable)</small> |
| TYPE OF PAYMENT: (must check one) <input checked="" type="checkbox"/> Gift <input type="checkbox"/> Income |
| DESCRIPTION: <u>Airfare for participation in 2 panel discussions</u> |

Comments: _____

SCHEDULE E
Income – Gifts
Travel Payments, Advances,
and Reimbursements

| |
|--|
| CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION |
| Name <div style="text-align: right;">Teresa Takai</div> |

- Reminder – you must mark the gift or income box.
- You are not required to report “income” from government agencies.

| |
|---|
| ► NAME OF SOURCE <u>Governing</u> |
| ADDRESS <u>1100 Connecticut Ave. NW, Suite 1300</u> |
| CITY AND STATE <u>Washington, DC 20036</u> |
| BUSINESS ACTIVITY, IF ANY, OF SOURCE <u></u> |
| DATE(S): <u>07 / 31 / 08</u> - <u>07 / 31 / 08</u> AMT: \$ <u>1764.00</u> <small>(If applicable)</small> |
| TYPE OF PAYMENT: (must check one) <input checked="" type="checkbox"/> Gift <input type="checkbox"/> Income |
| DESCRIPTION: <u>Airfare for participation panel discussions</u> |

| |
|--|
| ► NAME OF SOURCE <u>Government Technology</u> |
| ADDRESS <u>100 Blue Ravine Rd</u> |
| CITY AND STATE <u>Folsom, CA 95630</u> |
| BUSINESS ACTIVITY, IF ANY, OF SOURCE <u></u> |
| DATE(S): <u>09 / 07 / 08</u> - <u>09 / 09 / 08</u> AMT: \$ <u>597.50</u> <small>(If applicable)</small> |
| TYPE OF PAYMENT: (must check one) <input checked="" type="checkbox"/> Gift <input type="checkbox"/> Income |
| DESCRIPTION: <u>Airfare for participation in panel discussion</u> |

| |
|--|
| ► NAME OF SOURCE <u></u> |
| ADDRESS <u></u> |
| CITY AND STATE <u></u> |
| BUSINESS ACTIVITY, IF ANY, OF SOURCE <u></u> |
| DATE(S): <u> </u> / <u> </u> / <u> </u> - <u> </u> / <u> </u> / <u> </u> AMT: \$ <u> </u> <small>(If applicable)</small> |
| TYPE OF PAYMENT: (must check one) <input type="checkbox"/> Gift <input type="checkbox"/> Income |
| DESCRIPTION: <u></u> |

| |
|--|
| ► NAME OF SOURCE <u></u> |
| ADDRESS <u></u> |
| CITY AND STATE <u></u> |
| BUSINESS ACTIVITY, IF ANY, OF SOURCE <u></u> |
| DATE(S): <u> </u> / <u> </u> / <u> </u> - <u> </u> / <u> </u> / <u> </u> AMT: \$ <u> </u> <small>(If applicable)</small> |
| TYPE OF PAYMENT: (must check one) <input type="checkbox"/> Gift <input type="checkbox"/> Income |
| DESCRIPTION: <u></u> |

Comments: